New Frontiers in Point-of-Care Coagulation Testing: Business Challenges, Emerging Technologies, Competitive Landscape

Table of Contents

Introduction

Executive Summary

Rationale for Testing Decentralization

- 1. Overview
- 2. Regulatory Trends
- 3. Economic Trends
- 4. Demographic Trends
- 5. Technological Trends
- 6. Social Trends
- 7. Quality of Care
- 8. Defensive Medicine
- 9. Quality Control Issues

Worldwide Market and Technology Overview

- 1. Introduction
- 2. Activated Partial Thromboplastin Time (APTT)
- 3. Alpha-2 Antiplasmin
- 4. Antithrombin III
- 5. Bleeding Time
- 6. D-Dimer
- 7. Factor VIII
- 8. Fibrin Degradation Products
- 9. Fibrinogen
- 10. Heparin
- 11. Proteins C and S
- 12. Prothrombin Time (PT)
- 13. Thrombin Time

Instrumentation: Coagulation Analyzers Manufactured by:

- Behnk Elektronik
- Bio/Data
- Cardiovascular Diagnostics
- Diagnostica Stago
- Helena Laboratories
- Instrumentation Laboratory
- ITC Hemochron
- Roche
- Siemens
- Sysmex
- Teco Medical Instruments
- Trinity Biotech

Current and Emerging Technologies

- 1. Monoclonal Antibodies
- 2. Immunoassays
 - a. Technological Principle
 - b. Enzyme Immunoassays (EIA)
 - ? Overview
 - ? ELISA
 - ? Dot Immunobinding Assays
 - ? Capillary Immunoassays
 - ? Particle-Membrane Capture Immunoassay
 - ? Enzyme Amplification
 - c. Fluorescent Immunoassays
 - ? Fluorescent Polarization
 - ? Time-Resolved Pulse Fluorescence
 - d. Luminescence
 - ? Chemiluminescence
 - ? Bioluminescence
 - e. Latex Agglutination
 - f. Immunoprecipitation
- 3. Dry Chemistry
- 4. Biosensors
- 5. IT and Automation
- 6. Molecular Diagnostics
 - a. Technology Overview
 - b. Amplification Methods
 - ? Polymerase Chain Reaction

- ? Ligase Chain Reaction
- ? Branched DNA
- ? Q-Beta Replicase
- ? Strand Displacement Activation
- ? Self-Sustained Sequence Replicase

U.S.A.

- A. Market Overview
 - 1. Business Environment
 - a. Health Care Expenditures
 - b. Cost Consciousness
 - c. Reimbursement
 - d. Industry Consolidation
 - e. Managed Care
 - ? PPO
 - ? HMO
 - f. Hospitals
 - g. Admissions
 - h. Length of Stay
 - i. Industry Diversification
 - j. Physician Demographics
 - k. Aging Population
 - ? More Chronic Illness
 - ? Disease Incidence
 - ? Susceptibility to latrogenesis
 - ? Multiple Illnesses Cases
 - I. Laboratory Regulations
 - 2. Market Structure
 - a. Hospitals
 - b. Commercial/Private Laboratories
- B. Physician Offices/Group Practices
 - 1. Market Summary
 - 2. Market Structure
 - 3. Test Volume and Sales Forecasts
- C. Ancillary Hospital Locations
 - 1. Introduction
 - a. Emergency Departments
 - b. Operating Suites
 - c. Intensive Care Units
 - 2. Emergency Departments

- a. Market Summary
- b. Test volume and Sales Forecasts
- 3. Operating and Recovery Suites
 - a. Market Summary
 - b. Test Volume and Sales Forecasts
- 4. ICUs/CCUs
 - a. Market Summary
 - b. Test Volume and Sales Forecasts
- D. Cancer Clinics
 - 1. Introduction
 - 2. Market Summary
 - 3. Test Volume and Sales Forecasts
- E. Ambulatory Care Centers
 - 1. Introduction
 - 2. Market Summary
 - 3. Market Structure
 - 4. Test Volume and Sales Forecasts
- F. Surgery Centers
 - 1. Introduction
 - 2. Market Summary
 - 3. Market Structure
 - 4. Test Volume and Sales Forecasts
- G. Nursing Homes
 - 1. Introduction
 - 2. Market Summary
 - 3. Market Structure
 - 4. Test Volume and Sales Forecasts
- H. Birth Centers
 - 1. Introduction
 - 2. Market Summary
 - 3. Market Structure
 - 4. Test Volume and Sales Forecasts
- I. Major Suppliers' Instrument Placements,

Installed Base, Consumables Sales and Market Shares

Germany

- A. Market Overview
- B. Market Structure
- C. Market Summary

- D. Test Volume and Sales Forecasts
- E. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and Market Shares

Spain

- A. Business Environment
- B. Market Structure
- C. Market Summary
- D. Test Volume and Sales Forecasts
- E. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and Market Shares

Major Product Development Opportunities

- A. Routine and Special Chemistry
- B. Microbiology/Infectious Diseases
- C. Hematology and Flow Cytometry
- D. Coagulation

<u>Design Criteria for Decentralized Testing Products</u>

Alternative Market Penetration Strategies

- A. Internal Development
- B. Collaborative Arrangements
- C. University Contracts
- D. Distribution Strategies for Decentralized Testing Markets
 - 1. Marketing Approaches
 - 2. Product complexity
 - 3. Customer Preference
 - 4. Established Suppliers
 - 5. Emerging Suppliers
 - 6. Major Types of Distributors
 - 7. Market Segmentation

Potential Market Entry Barriers and Risks

- A. Market Maturity
- B. Cost Containment
- C. Competition
- D. Technological Edge and Limitations
- E. Patent Protection
- F. Regulatory Constraints
- G. Decentralized Testing Market Challenges

Company Profile

- Abbott
- ADI/American Diagnostica
- Axis-Shield
- Alere/Biosite/Inverness
- Beckman Coulter/Danaher
- Becton Dickinson
- Bio/Data Corporation
- Chrono-Log
- Corgenix Medical
- Diagnostica Stago/Trinity Biotech
- Grifols
- Helena Laboratories
- Hyphen BioMed
- Instrumentation Laboratory
- ITC/Nexus Dx
- Roche
- Siemens
- Sienco
- Sysmex
- Thermo Fisher
- ZyCare/Alere

List of Tables

Major Companies Developing or Marketing APTT Tests

Major Companies Developing or Marketing Alpha-2 Antiplasmin Tests

Major Companies Developing or Marketing Antithrombin III Tests

Major Companies Developing or Marketing Bleeding Time Tests

Major Companies Developing or Marketing D-Dimer Tests

Major Companies Developing or Marketing Factor Assays Tests

Major Companies Developing or Marketing Fibrin Degradation Product Tests

Major Companies Developing or Marketing Fibrinogen Tests

Major Companies Developing or Marketing Heparin Tests

Major Companies Developing or Marketing Protein C Tests

Major Companies Developing or Marketing Protein S Tests

Major Companies Developing or Marketing PT Tests

Major Companies Developing or Marketing Thrombin Time Tests

List of Tables (continued)

U.S.A., Physician Office/Group Practice Laboratories Forecast by Practice Size

U.S.A., Physician Offices/Group Practices Forecast by Type

U.S.A., Office-Based Physicians Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Coagulation Test Volume Forecast

U.S.A., Physician Offices/Group Practices Coagulation Reagent and Instrument Sales Forecast

U.S.A., Ancillary Hospital Locations Estimated Number

U.S.A., Ancillary Hospital Locations Annual Utilization

U.S.A., Hospital Emergency Departments Coagulation Test Volume Forecast

U.S.A., Hospital Emergency Departments
Coagulation Reagent and Instrument Sales Forecast

U.S.A., Hospital Operating and Recovery Suites Coagulation Test Volume Forecast

U.S.A., Hospital Operating and Recovery Suites Coagulation Reagent and Instrument Sales Forecast

U.S.A., Hospital ICUs/CCUs Coagulation Test Volume Forecast

U.S.A., Hospital ICUs/CCUs Coagulation Reagent and Instrument Sales Forecast

U.S.A., Cancer Clinics Major Coagulation Test Volume Forecast

U.S.A., Cancer Clinics Coagulation Reagent and Instrument Sales Forecast

List of Tables (continued)

U.S.A., Ambulatory Care Centers Estimated Number of Facilities and Patient Visits

U.S.A., Ambulatory Care Centers Most Frequent Diagnoses

U.S.A., Ambulatory Care Centers Coagulation Test Volume Forecast

U.S.A., Ambulatory Care Centers Coagulation Reagent and Instrument Sales Forecast

U.S.A., Surgery Centers Most Frequently Performed Procedures

U.S.A., Surgery Centers Coagulation Test Volume Forecast

U.S.A., Surgery Centers Coagulation Reagent and Instrument Sales Forecast

U.S.A., Nursing Homes Estimated Number of Facilities, Beds and Occupancy Rate

U.S.A., Nursing Homes Coagulation Test Volume Forecast

U.S.A., Nursing Homes Coagulation Reagent and Instrument Sales Forecast

List of Tables (continued)

U.S.A., Birth Centers Facilities, Patient Visits, and Births

U.S.A., Birth Centers Coagulation Test Volume Forecast

U.S.A., Birth Centers Coagulation Reagent and Instrument Sales Forecast

U.S.A., Major Suppliers of Coagulation Diagnostic Products Estimated Market Shares

Germany, Laboratory Performing Diagnostic Tests by Market Segment

Germany, Physician Offices/Group Practices Coagulation Test Volume Forecast

Germany, Physician Offices/Group Practices Coagulation Reagent and Instrument Sales Forecast

Germany, Major Suppliers of Coagulation Diagnostic Products Estimated Market Shares

Spain, Laboratory Performing Coagulation Tests by Market Segment

Spain, Ambulatory Care Centers Coagulation Test Volume Forecast

Spain, Ambulatory Care Centers Coagulation Reagent and Instrument Sales Forecast

Spain, Major Suppliers of Coagulation Diagnostic Products Estimated Market Shares